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Data Conversion Report

November 13, 2000

SFA Ombudsman Case Tracking System (OCTS) Version 2.0

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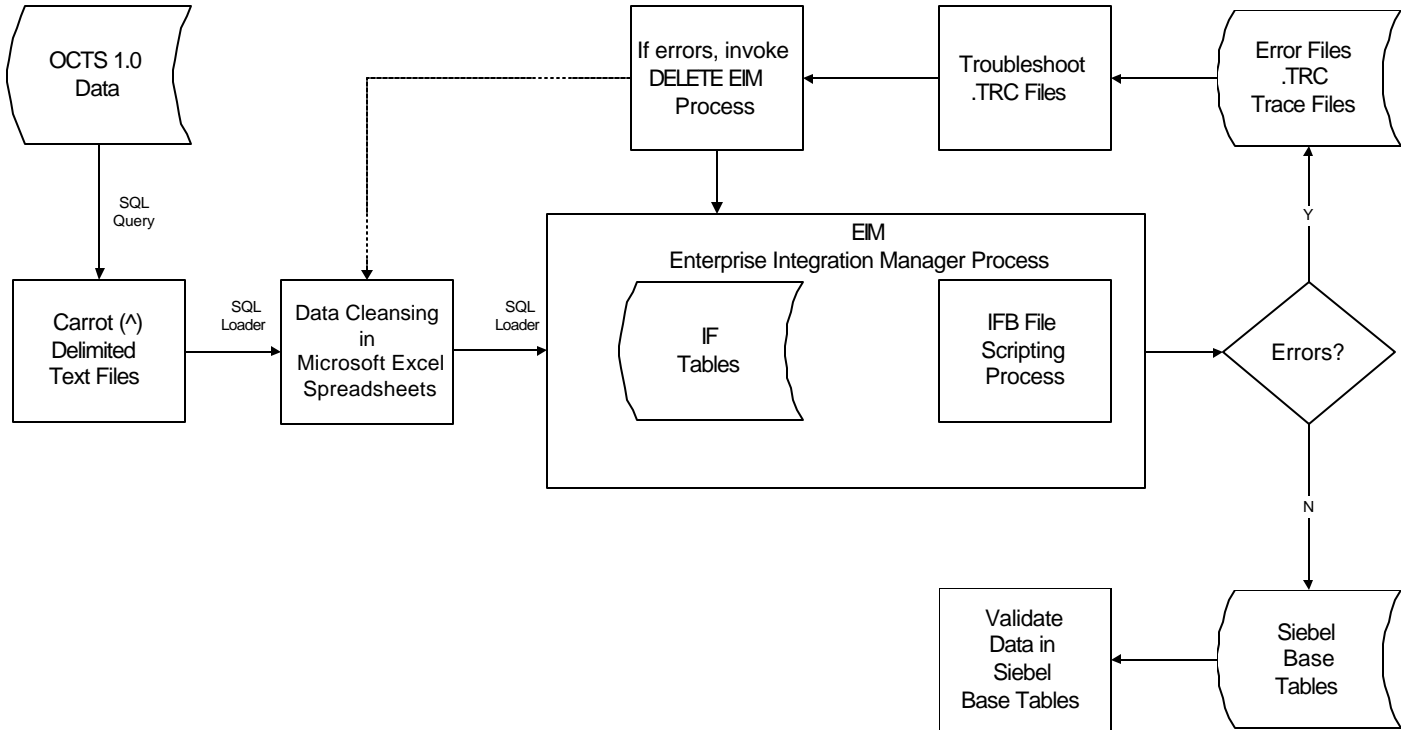
Introduction

This document contains the Data Conversion Report documenting the process used to successfully convert OCTS 1.0 legacy data to the new OCTS 2.0 Siebel application. It is organized into the following sections:

- Data Conversion Overview Process Flow
- Data Conversion Procedures
- Data Conversion IF Files
- Data Conversion Record Counts and Notes

This document is Deliverable #11.2.7 Data Conversion Report as outlined in Task Order #11, Modification 1: Ombudsman CRM Implementation.

Data Conversion Overview Process Flow



Data Conversion Procedures

This section outlines the OCTS 2.0 Data Conversion Procedures for the following initiatives as shown in the Data Conversion Environment section of this document.

Data Conversion Task #1:

Converting all of Yolanda Blackman's Cases from OCTS 1.0 into the OCTS 2.0 Training Database.

Data Conversion Task #2:

Converting all of Debra Wiley's, Dottie Kingsley's, and Joyce DeMoss's Open Cases as of 7/7 and Debra Wiley's, Dottie Kingsley's, and Joyce DeMoss's Closed Cases from 7/7 to 6/21 from OCTS 1.0 into the VDC Development Database.

Data Conversion Task #3:

Converting all Closed Cases as of 6/21 (excludes Yolanda Blackman's Cases) from OCTS 1.0 into the VDC Development Database.

Data Conversion Task #4:

Converting all of Yolanda Blackman's Cases from OCTS 2.0 Training Database into the VDC Development Database.

Data Conversion Task #5:

Converting all Closed Cases from 7/23 to 7/31 (excludes Debra Wiley's, Dottie Kingsley's, Joyce DeMoss's, and Yolanda Blackman's Cases) from OCTS 1.0 into the VDC Development Database.

Data Conversion Task #6:

Converting all Closed Cases from 6/22 to 7/22 (excludes Debra Wiley's, Dottie Kingsley's, Joyce DeMoss's, and Yolanda Blackman's Cases) from OCTS 1.0 into the VDC Development Database.

Data Conversion Task #7:

Converting all Closed Cases from 8/1 to 8/15 (excludes Debra Wiley's, Dottie Kingsley's, Joyce DeMoss's, and Yolanda Blackman's Cases) from OCTS 1.0 into the VDC Development Database.

Data Conversion Task #8:

Converting all of Debra Wiley's, Dottie Kingsley's, Joyce DeMoss's, and Yolanda Blackman's Cases from VDC Development Database into OCTS 1.0.

Data Conversion Task #9:

Converting all Closed Cases (excluding Debra Wiley's, Dottie Kingsley's, Joyce DeMoss's, and Yolanda Blackman's Cases) from VDC Development Database into Microsoft Excel.

Data Conversion Task #10:

Converting all OCTS 1.0 Accounts and Contacts into OCTS 2.0 "Go Live" Database. Also, converting all Open Cases as of 10/27, 8:30 p.m. EST from OCTS 1.0 into the OCTS 2.0 "Go Live" Database.

Data Conversion Task #11:

Converting all OCTS 1.0 Closed Cases and corresponding Activities as of 11/6 into OCTS 2.0 "Go Live" Database.

The following is a detailed outline of steps performed to convert data from OCTS 1.0 into the OCTS 2.0 Siebel application:

Step	Person(s)	Task(s)
1.	Vince Ferrer, Chris Hill	Create and execute SQL queries to pull applicable case data from OCTS 1.0 system.
2.	Vince Ferrer, Chris Hill	Create .dat files from the above SQL queries. In particular, the following .dat files should be generated: S_ACCOUNT_IF.dat, S_ACT_DTLIF.dat, S_CONTACT2_IF.dat, S_CONTACT_DTLIF.dat, S_SRV_REQ_IF.dat, S_SR_DTLIF.dat, S_ACTIVITY_IF.dat, S_ACT_DTLIF.dat. Please note some non-OCTS 1.0 values are populated in certain fields in the .dat file creation process based on Siebel configuration/business rules. One such example, is populating "Not-Given" is Siebel required fields.
3.	Dave Fein	Import each .dat file into Microsoft Excel (separating the files by carrots or ^). Be sure to import all fields as Text so leading zeros in the SSN, Zip Code, and other fields are maintained. If the fields are <u>not</u> imported as Text , the Date fields will need to be formatted as MM/DD/YYYY, the SSN fields will need to be formatted as 000000000, and the Zip Code fields will need to be formatted as 00000.
4.	Dave Fein	Remove any comments (stating "X Rows Selected") at the end of the each of the .xls files namely, S_ACCOUNT_IF.dat, S_ACT_DTLIF.dat, S_CONTACT2_IF.dat, S_CONTACT_DTLIF.dat, S_SRV_REQ_IF.dat, S_SR_DTLIF.dat, S_ACTIVITY_IF.dat, S_ACT_DTLIF.dat.
5.	Dave Fein	Remove any non-character values in each of the xls files--namely, S_ACCOUNT_IF.dat, S_ACT_DTLIF.dat, S_CONTACT2_IF.dat, S_CONTACT_DTLIF.dat, S_SRV_REQ_IF.dat, S_SR_DTLIF.dat, S_ACTIVITY_IF.dat, S_ACT_DTLIF.dat. These non-character values could not be eliminated via the SQL queries but can be removed in the Microsoft Excel spreadsheets manually. There is always a non-character value at the beginning of each .xls file.
6.	Dave Fein	Remove any extra spaces at the end of the "FOR_IMPORT" field in each of the .xls files--namely, S_ACCOUNT_IF.dat, S_ACT_DTLIF.dat, S_CONTACT2_IF.dat, S_CONTACT_DTLIF.dat, S_SRV_REQ_IF.dat, S_SR_DTLIF.dat, S_ACTIVITY_IF.dat, S_ACT_DTLIF.dat.
7.	Dave Fein	Remove any extra spaces at the end of the Last Name and First Name fields in S_SRV_REQ_IF.xls.
8.	Dave Fein	If there is no Ombudsman Specialist's name in the S_SRV_REQ_IF.xls, populate "UNASSIGNED" in the Ombudsman Specialist field.
9.	Dave Fein	Insert hyphens or "-" between numbers in all Social Security Number fields.
10.	Dave Fein	Remove any duplicate/repeated records in each of the .xls files (using primary key field)--namely, S_ACCOUNT_IF.dat (SSN), S_ACT_DTLIF.dat (SSN), S_CONTACT2_IF.dat (SSN), S_CONTACT_DTLIF.dat (SSN), S_SRV_REQ_IF.dat (Case ID), S_SR_DTLIF.dat (Case ID), S_ACTIVITY_IF.dat (Contact ID), S_ACT_DTLIF.dat (Contact ID).
11.	Dave Fein	Validate that each record in S_ACCOUNT_IF.xls has a corresponding record in S_ACT_DTLIF.xls.
12.	Dave Fein	Validate that each record in S_CONTACT2_IF.xls has a corresponding record in S_CONTACT_DTLIF.xls.
13.	Dave Fein	Validate that each record in S_ACCOUNT_IF.xls has a corresponding record in S_CONTACT2_IF.xls.
14.	Dave Fein	Validate that each record in S_SRV_REQ_IF.xls has a corresponding record in S_SR_DTLIF.xls.
15.	Dave Fein	Validate that each record in S_ACTIVITY_IF.xls has a corresponding record in S_ACT_DTLIF.xls.

The following is a detailed outline of steps performed to convert data from OCTS 1.0 into the OCTS 2.0 Siebel application:

Step	Person(s)	Task(s)
16.	Dave Fein	Validate that each record in S_ACTIVITY_IF.xls has a corresponding Case record in S_SR_DTLIF.xls.
17.	Dave Fein	For each Service Request that doesn't have a corresponding Account or Contact, create an Account and Contact record with the following information: Last Name=(space)Public First Name=John MI=Q SSN=000-00-0000
18.	Dave Fein	Update the S_SRV_REQ_IF.xls, S_SR_DTLIF.xls, S_ACTIVITY_IF.xls, and S_ACT_DTLIF.xls fields for all records which should correlate to the John Q. Public account.
19.	Dave Fein	Append S_ACCOUNT_DTLIF.xls with Account Notes from the CUST_PL.txt file.
20.	Dave Fein	Append S_CONTACT_DTLIF.xls with Contact Notes from the CUST_PL.txt file.
21.	Dave Fein	Append S_SR_DTLIF.xls with Issue Summary Notes from the SUMMARYA.txt file and Next Steps Notes from the NEXT_PL.txt file.
22.	Dave Fein	Append S_ACT_DTLIF.xls with Contact Notes from the CONT_PLA.txt file.
23.	Dave Fein	If necessary, remove an "#N/A" entries in the comment fields and replace it with a blank space.
24.	Dave Fein	Concatenate (or combine) the SUMMARYA and NEXT_PL comments fields into one field. Place these comments in the SUMMARYA column.
25.	Dave Fein	"Blank out" the comments formerly in the NEXT_PL column in the Microsoft Excel spreadsheet.
26.	Dave Fein	Note any S_ACT_DTLIF, S_ACCOUNT_DTLIF, S_CONTACT_DTLIF, and/or S_SR_DTLIF records which contain comment fields greater than 2,000 characters in length.
27.	Dave Fein	Remove and save any records which contain comment fields greater than 2,000 characters in length. These records will be manually attached to the case in Account Notes, Contact Notes, Case or Activity Notes via a Microsoft Word attachment.
28.	Dave Fein	If necessary, for each Account, Contact, Case, or Activity that contains comment fields greater than 2,000 characters in length, insert "Refer to attached Microsoft Word document for Activity Comments" entry to advise the user to refer to this attachment for comments.
29.	Dave Fein	Due to OCTS 2.0 picklist changes, search and replace OCTS 1.0 values for proper OCTS 2.0 picklist changes for Logins/Positions in S_CONTACT2_IF, Loan Types in S_SRV_REQ_IF, and Primary Complaint in S_SR_DTLIF.
30.	Dave Fein	Replace "Not-Given" with "Not Given" in any address fields in S_ACCOUNT_IF, S_ACCOUNT_DTLIF, S_CONTACT2_IF, and S_CONTACT_DTLIF.
31.	Dave Fein	Sort the S_ACCOUNT_IF.xls and S_ACCOUNT_DTLIF.xls by SSN to ensure they are in a one-to-one relationship.
32.	Dave Fein	Sort the S_CONTACT2_IF.xls and S_CONTACT_DTLIF.xls by SSN to ensure they are in a one-to-one relationship.
33.	Dave Fein	Sort the S_SRV_REQ_IF.xls and S_SR_DTLIF.xls by Case Id to ensure they are in a one-to-one relationship.
34.	Dave Fein	Sort the S_ACTIVITY_IF.xls and S_ACT_DTLIF.xls by Contact Id to ensure they are in a

The following is a detailed outline of steps performed to convert data from OCTS 1.0 into the OCTS 2.0 Siebel application:

Step	Person(s)	Task(s)
		one-to-one relationship.
35.	Dave Fein	Remove the Cust. No. column/field in ACCOUNT_DTLIF.xls. This was field was used as the primary key field to append the Contact Notes to ACT_DTLIF.xls.
36.	Dave Fein	Remove the Cust. No. column/field in S_CONTACT_DTLIF.xls. This was field was used as the primary key field to append the Contact Notes to S_CONTACT_DTLIF.xls.
37.	Dave Fein	If necessary, remove any Customer (A) records without corresponding Case-Inquiry (B) records from the .xls file and save these records to another spreadsheet.
38.	Dave Fein	If necessary, remove any Contact History (C) records without corresponding Case-Inquiry (B) records from the .xls file and save these records to another spreadsheet.
39.	Dave Fein	After saving the .xls files, resave each file as a Tab-Delimited .txt file.
40.	Dave Fein	Open each .txt file in Microsoft Word and replace each tab in the file with a carrot or ^.
41.	Dave Fein	Remove any quotation marks or " in Microsoft Word and replace them with blank spaces.
42.	Dave Fein	Save each Microsoft Word document as a .txt file.
43.	Dave Fein	Rename each .txt file with the .dat extension and place each file in the correct location on the LAN for loading into the IF tables.
44.	Dave Fein	Validate that each Control (.ctl) file has the correct and sequential fields to be imported from the .dat files into the IF tables in Siebel.
45.	Jijo Jacob, Dave Fein	Execute the SQL Loader to load each .dat file--namely, S_ACCOUNT_IF.dat, S_ACT_DTLIF.dat, S_CONTACT2_IF.dat, S_CONTACT_DTLIF.dat, S_SRV_REQ_IF.dat, S_SR_DTLIF.dat, S_ACTIVITY_IF.dat, S_ACT_DTLIF.dat into its respective IF table.
46.	Jijo Jacob, Dave Fein	Review the .dat file execution log to validate that there were no errors upon loading and that the number of records in each .dat file equals the number of records in the respective IF tables.
47.	Jijo Jacob, Dave Fein	Count and record the number of Employee data records in the IF tables and batches (e.g. 100 records=1 batch) to be imported into OCTS 2.0 Siebel base tables.
48.	Jijo Jacob, Dave Fein	Import Employee data from corresponding IF tables to the OCTS 2.0 Siebel base tables by running the EIM process.
49.	Jijo Jacob, Dave Fein	Validate the number of Employee data records in the IF tables and batches imported into OCTS 2.0 Siebel base tables.
50.	Jijo Jacob, Dave Fein	If errors occur in the EIM process, troubleshoot the .TRC Trace files for source of error.
51.	Jijo Jacob, Dave Fein	If data is partially imported, revoke the partially imported data by executing the DELETE EIM process.
52.	Jijo Jacob, Dave Fein	Count and record the number of Account data records in the IF tables and batches (e.g. 100 records=1 batch) to be imported into OCTS 2.0 Siebel base tables.
53.	Jijo Jacob, Dave Fein	Import Account data from corresponding IF tables to the OCTS 2.0 Siebel base tables by running the EIM process.
54.	Jijo Jacob, Dave Fein	Validate the number of Account data records in the IF tables and batches imported into OCTS 2.0 Siebel base tables.
55.	Jijo Jacob, Dave Fein	If errors occur in the EIM process, troubleshoot the .TRC Trace files for source of error.

The following is a detailed outline of steps performed to convert data from OCTS 1.0 into the OCTS 2.0 Siebel application:

Step	Person(s)	Task(s)
56.	Jijo Jacob, Dave Fein	If data is partially imported, revoke the partially imported data by executing the DELETE EIM process.
57.	Jijo Jacob, Dave Fein	Count and record the number of Contact data records in the IF tables and batches (e.g. 100 records=1 batch) to be imported into OCTS 2.0 Siebel base tables.
58.	Jijo Jacob, Dave Fein	Import Contact data from corresponding IF tables to the OCTS 2.0 Siebel base tables by running the EIM process.
59.	Jijo Jacob, Dave Fein	Validate the number of Contact data records in the IF tables and batches imported into OCTS 2.0 Siebel base tables.
60.	Jijo Jacob, Dave Fein	If errors occur in the EIM process, troubleshoot the .TRC Trace files for source of error.
61.	Jijo Jacob, Dave Fein	If data is partially imported, revoke the partially imported data by executing the DELETE EIM process.
62.	Jijo Jacob, Dave Fein	Count and record the number of Service Request data records in the IF tables and batches (e.g. 100 records=1 batch) to be imported into OCTS 2.0 Siebel base tables.
63.	Jijo Jacob, Dave Fein	Import Service Request data from corresponding IF tables to the OCTS 2.0 Siebel base tables by running the EIM process.
64.	Jijo Jacob, Dave Fein	Validate the number of Service Request data records in the IF tables and batches imported into OCTS 2.0 Siebel base tables.
65.	Jijo Jacob, Dave Fein	If errors occur in the EIM process, troubleshoot the .TRC Trace files for source of error.
66.	Jijo Jacob, Dave Fein	If data is partially imported, revoke the partially imported data by executing the DELETE EIM process.
67.	Jijo Jacob, Dave Fein	Count and record the number of Activity data records in the IF tables and batches (e.g. 100 records=1 batch) to be imported into OCTS 2.0 Siebel base tables.
68.	Jijo Jacob, Dave Fein	Import Activity data from corresponding IF tables to the OCTS 2.0 Siebel base tables by running the EIM process.
69.	Jijo Jacob, Dave Fein	Validate the number of Activity data records in the IF tables and batches imported into OCTS 2.0 Siebel base tables.
70.	Jijo Jacob, Dave Fein	If the Activity Notes (X_COMMENTS in S_EVT_ACT_X) did not convert from the IF tables into the Siebel base tables via EIM, run a PL/SQL script to convert the Activity Notes into the Siebel base tables.
71.	Jijo Jacob, Dave Fein	If errors occur in the EIM process, troubleshoot the .TRC Trace files for source of error.
72.	Jijo Jacob, Dave Fein	If data is partially imported, revoke the partially imported data by executing the DELETE EIM process.
73.	Jijo Jacob, Dave Fein	Validate that the number of Employee, Account, Contact, Service Request, and Activity records in the Siebel GUI equates to the number of records in the IF tables.
74.	Jijo Jacob, Dave Fein	If the Account Notes is not properly populated via the EIM script, run a PL/SQL script to convert the Account Notes field from the IF Tables to Siebel Base Tables.
75.	Jijo Jacob, Dave Fein	If the Contact Notes is not properly populated via the EIM script, run a PL/SQL script to convert the Contact Notes field from the IF Tables to Siebel Base Tables.
76.	Jijo Jacob, Dave Fein	If the Service Request Original Issue Summary field is not properly populated via the EIM script, run a PL/SQL script to convert the Service Request Original Issue Summary field

The following is a detailed outline of steps performed to convert data from OCTS 1.0 into the OCTS 2.0 Siebel application:

Step	Person(s)	Task(s)
	Dave Fein	from the IF Tables to Siebel Base Tables.
77.	Jijo Jacob, Dave Fein	If the Service Request Customer Expectation Summary field is not properly populated via the EIM script, run a PL/SQL script to convert the Service Request Customer Expectation Summary field from the IF Tables to Siebel Base Tables.
78.	Jijo Jacob, Dave Fein	If the Activity Comments field is not properly populated via the EIM script, run a PL/SQL script to convert the Activity Comments field from the IF Tables to Siebel Base Tables.
79.	Jijo Jacob, Dave Fein	Run a PL/SQL script to convert the Date Created field from the server date to the OCTS 1.0 Date Created field stored in EXT_ATTRIB_13.
80.	Jijo Jacob, Dave Fein	Run a PL/SQL script to convert the Created By field from the server administrator's login—SADMIN--to the OCTS 1.0 Intake Specialist's name field stored in EXT_ATTRIB_43.
81.	Dave Fein	If necessary, manually attach a Microsoft Word document to each case containing comments with greater than 2,000 characters in length.
82.	Dave Fein	If necessary, manually consolidate any Accounts, Contacts, Cases, or Activities which may not have been imported in the OCTS 2.0 Siebel application because the records contained duplicate SSNs.
83.	Jijo Jacob, Dave Fein	Perform application/integration testing to see if the interworkings of the OCTS 2.0 Siebel application function properly.

Data Conversion IF Files

In order to load data from the OCTS 1.0 system to the OCTS 2.0 Siebel application, all applicable legacy fields must be mapped to corresponding fields in the Siebel IF files. In particular, the following IF files are necessary for the OCTS 1.0 to OCTS 2.0 Data Conversion effort:

No.	IF File Name	Business Component	OCTS 1.0/NSLDS Legacy Screen
1.	ACCOUNT_IF	Account	Customer Information
2.	ACCOUNT_DTLIF	Account	Customer Information
3.	S_CONTACT2_IF	Contact	Customer Information
4.	S_CONTACT_DTLIF	Contact	Customer Information
5.	S_SRV_REQ_IF	Service Request	Case
6.	S_SR_DTLIF	Service Request	Case
7.	S_ACTIVITY_IF	Activity	Case History
8.	S_ACT_DTLIF	Activity	Case History

For a complete listing of all fields to be included in each of these IF files, please refer to Appendix A – OCTS 1.0 to OCTS 2.0 Data Element Mapping.

Data Conversion Record Counts and Notes

Data Conversion Task #1

Converting all of Yolanda Blackman's Cases from OCTS 1.0 into the OCTS 2.0 Training Database.

IF File Name	OCTS 1.0 .DAT Records	OCTS 1.0 .XLS Records	Siebel IF Table Records	Siebel Base Table Records	Comments
S_ACCOUNT_IF	63	63	63	63	
S_ACCOUNT_DTLIF	63	63	63	63	
S_CONTACT2_IF	63	63	63	63	
S_CONTACT_DTLIF	63	63	63	63	
S_SRV_REQ_IF	55	55	55	55	
S_SR_DTLIF	55	55	55	55	
S_ACTIVITY_IF	356	356	356	356	
S_ACT_DTLIF	356	356	356	356	

Note(s):

None

Data Conversion Task #2

Converting all of Debra Wiley's, Dottie Kingsley's, and Joyce DeMoss's Open Cases as of 7/7 and Debra Wiley's, Dottie Kingsley's, and Joyce DeMoss's Closed Cases from 7/7 to 6/21 from OCTS 1.0 into the VDC Development Database.

IF File Name	OCTS 1.0 .DAT Records	OCTS 1.0 .XLS Records	Siebel IF Table Records	Siebel Base Table Records	Comments
S_ACCOUNT_IF	16	16	16	16	
S_ACCOUNT_DTLIF	16	16	16	16	
S_CONTACT2_IF	16	16	16	16	
S_CONTACT_DTLIF	16	16	16	16	
S_SRV_REQ_IF	16	16	16	16	
S_SR_DTLIF	16	16	16	16	
S_ACTIVITY_IF	211	211	211	211	
S_ACT_DTLIF	211	211	211	211	

Note(s):

None

Data Conversion Task #3

Converting all Closed Cases as of 6/21 (excludes Yolanda Blackman's Cases) from OCTS 1.0 into the VDC Development Database.

Pass 1: 07/10/2000

IF File Name	OCTS 1.0 .DAT Records	OCTS 1.0 .XLS Records	Siebel IF Table Records	Siebel Base Table Records	Comments
S_ACCOUNT_IF	1,107	1,107	N/A	N/A	
S_ACCOUNT_DTLIF	1,107	1,107	N/A	N/A	
S_CONTACT2_IF	1,107	1,107	N/A	N/A	
S_CONTACT_DTLIF	1,107	1,107	N/A	N/A	
S_SRV_REQ_IF	3,735	3,735	N/A	N/A	
S_SR_DTLIF	3,735	3,735	N/A	N/A	
S_ACTIVITY_IF	11,478	11,478	N/A	N/A	
S_ACT_DTLIF	11,478	11,478	N/A	N/A	

Note(s):

1. Data Conversion Task #2, Pass 1 ceased upon learning that some Service Requests (Cases) did not have corresponding Accounts/Contacts in the .DAT files generated from the SQL queries, but the Service Requests (Cases) did have corresponding Accounts/Contacts in the OCTS 1.0 system. Additionally, Service Requests (Cases) which did not have corresponding Accounts/Contacts (B's without A's) were not pulled from the OCTS 1.0 system as originally intended. In error, only Service Requests (Cases) with corresponding Accounts/Contacts were pulled. Both of these concepts were confirmed upon generating new .DAT files in Pass Data Conversion Task #2, Pass 2 as additional Accounts, Contacts, Service Requests, and Activities were generated.

(Please refer to next page for Data Conversion Task #2, Pass 2: 07/12/2000)

Data Conversion Task #3 (continued)

Pass 2: 07/12/2000

IF File Name	OCTS 1.0 .DAT Records	OCTS 1.0 .XLS Records	Siebel IF Table Records	Siebel Base Table Records	Comments
S_ACCOUNT_IF	3,349	3,349	3,258*	3,258*	*Refer to Note #1 below
S_ACCOUNT_DTLIF	3,359	3,359	3,258*	3,258*	*Refer to Note #1 below
S_CONTACT2_IF	3,533	3,533	3,258*	3,258*	*Refer to Note #1 below
S_CONTACT_DTLIF	3,360	3,360	3,258*	3,258*	*Refer to Note #1 below
S_SRV_REQ_IF	4,079	4,079	4,079	4,079	
S_SR_DTLIF	4,079	4,079	4,079	4,079	Refer to Note #3 below
S_ACTIVITY_IF	13,312	13,312	13,312	13,312	
S_ACT_DTLIF	13,312	13,312	13,312	13,312	Refer to Note #3 below

Note(s):

1. 91 ACCOUNT_IF records, 101 ACCOUNT_DTLIF records, 275 CONTACT2_IF records, and 101 S_CONTACT_DTLIF records were not imported into the OCTS 2.0 Siebel application because they contained duplicate SSNs. Since the SSN field is the primary key in Siebel, records with the same SSN could not be imported into Siebel without errors. Consequently, a listing of all of these duplicate records not imported in the Siebel application will be provided to the Ombudsman to make any necessary updates to records in the Siebel application post-Data Conversion.
2. Microsoft Word attachments were created for 140 Activity records since these Activity records contained OCTS 1.0 comments greater than 2,000 characters in length. The Siebel Activity Comments field was configured to only support comments less than 2,000 characters in length. *However, please note that all OCTS 1.0 Activity comments will be captured in the OCTS 2.0 Siebel application.*
3. Microsoft Word attachments were also created for 2 Service Request records since these Service Request records contained comments greater than 2,000 characters in length. Please refer to rationale above.

Data Conversion Task #4

Converting all of Yolanda Blackman's Cases from OCTS 2.0 Training Database into the VDC Development Database.

IF File Name	OCTS 1.0 .DAT Records	OCTS 1.0 .XLS Records	Siebel IF Table Records	Siebel Base Table Records	Comments
S_ACCOUNT_IF	59	59	59	59	
S_ACCOUNT_DTLIF	59	59	59	59	
S_CONTACT2_IF	59	59	59	59	
S_CONTACT_DTLIF	59	59	59	59	
S_SRV_REQ_IF	56	56	56	56	
S_SR_DTLIF	56	56	56	56	
S_ACTIVITY_IF	383*	383*	383*	383*	*Refer to Note #1 below
S_ACT_DTLIF	373*	373*	373*	373*	*Refer to Note #1 below

Note(s):

1. The total number of DTLIF records may be less than the total number of IF records if there were some fields in the DTLIF which were not populated in the OCTS 2.0 Training Database. For example, some of Yolanda Blackman's cases did not have Activity Comments associated with records in the S_ACTIVITY_IF to necessitate the creation of a record in the S_ACT_DTLIF. Thus, there were 373 S_ACT_DTLIF records for 383 S_ACTIVITY_IF records.

Data Conversion Task #5

Converting all Closed Cases from 7/23 to 7/31 (excludes Debra Wiley's, Dottie Kingsley's, Joyce DeMoss's, and Yolanda Blackman's Cases) from OCTS 1.0 into the VDC Development Database.

IF File Name	OCTS 1.0 .DAT Records	OCTS 1.0 .XLS Records	Siebel IF Table Records	Siebel Base Table Records	Comments
S_ACCOUNT_IF	291	291	287*	287*	*Refer to Note #1 below
S_ACCOUNT_DTLIF	291	291	287*	287*	*Refer to Note #1 below
S_CONTACT2_IF	291	291	287*	287*	*Refer to Note #1 below
S_CONTACT_DTLIF	291	291	287*	287*	*Refer to Note #1 below
S_SRV_REQ_IF	335	335	335	335	
S_SR_DTLIF	335	335	335	335	
S_ACTIVITY_IF	278	278	274*	274*	*Refer to Note #2 below
S_ACT_DTLIF	278	278	274*	274*	*Refer to Note #2 below

Note(s):

1. 4 Accounts/Contacts were duplicates from a previous Data Conversion effort and were subsequently not re-imported into OCTS 2.0 during this Data Conversion effort. These Accounts were: 513-54-7650, 575-74-0530, 550-33-2158, and 361-62-9824.
2. On a similar note, 4 Activities were not converted during this Data Conversion effort because the Activities already existed in OCTS 2.0. These Activities had the following Contact/Activity UID: 16354, 12520, 12668, and 13374. Each of these Activities corresponded to Account #513-54-7650 (Case: 3385).

Data Conversion Task #6

Converting all Closed Cases from 6/22 to 7/22 (excludes Debra Wiley's, Dottie Kingsley's, Joyce DeMoss's, and Yolanda Blackman's Cases) from OCTS 1.0 into the VDC Development Database.

IF File Name	OCTS 1.0 .DAT Records	OCTS 1.0 .XLS Records	Siebel IF Table Records	Siebel Base Table Records	Comments
S_ACCOUNT_IF	920	920	898*	898*	*Refer to Note #1 below
S_ACCOUNT_DTLIF	920	920	898*	898*	*Refer to Note #1 below
S_CONTACT2_IF	920	920	898*	898*	*Refer to Note #1 below
S_CONTACT_DTLIF	920	920	898*	898*	*Refer to Note #1 below
S_SRV_REQ_IF	1,046	1,046	1,046	1,046	
S_SR_DTLIF	1,046	1,046	1,046	1,046	
S_ACTIVITY_IF	2,481	2,481	2,481	2,481	
S_ACT_DTLIF	2,481	2,481	2,481	2,481	

Note(s):

- 22 Accounts/Contacts were duplicates from a previous Data Conversion effort and were subsequently not re-imported into OCTS 2.0 during this Data Conversion effort. These Accounts were:

- 266-25-4293
- 523-49-6595
- 084-60-8524
- 331-62-8524
- 279-28-5053
- 236-13-9951
- 489-58-6032
- 505-06-1584
- 594-26-8633
- 569-41-8619
- 518-24-6181
- 479-06-6466
- 508-74-0573
- 468-90-8844
- 432-29-6483
- 408-68-5462
- 293-78-5873
- 250-31-6151
- 232-90-2385
- 215-94-0899
- 010-68-7688
- 017-30-3542

Data Conversion Task #7

Converting all Closed Cases from 6/22 to 7/22 (excludes Debra Wiley's, Dottie Kingsley's, Joyce DeMoss's, and Yolanda Blackman's Cases) from OCTS 1.0 into the VDC Development Database.

IF File Name	OCTS 1.0 .DAT Records	OCTS 1.0 .XLS Records	Siebel IF Table Records	Siebel Base Table Records	Comments
S_ACCOUNT_IF	568	568	568	568	*Refer to Note #1 below
S_ACCOUNT_DTLIF	568	568	568	568	*Refer to Note #1 below
S_CONTACT2_IF	568	568	568	568	*Refer to Note #1 below
S_CONTACT_DTLIF	568	568	568	568	*Refer to Note #1 below
S_SRV_REQ_IF	622	622	622	622	
S_SR_DTLIF	622	622	622	622	
S_ACTIVITY_IF	1,685	1,685	1,685	1,685	
S_ACT_DTLIF	1,685	1,685	1,685	1,685	

Note(s):

- 11 Accounts/Contacts were duplicates from a previous Data Conversion effort and were subsequently not re-imported into OCTS 2.0 during this Data Conversion effort. These Accounts were:

- 529-04-6805
- 261-61-4425
- 020-30-8130
- 566-96-2156
- 568-15-3911
- 456-77-4763
- 337-60-9759
- 249-43-2463
- 214-60-4724
- 209-40-2710
- 106-68-5453

Data Conversion Task #8

Converting all of Debra Wiley's, Dottie Kingsley's, Joyce DeMoss's, and Yolanda Blackman's Cases from the VDC Development Database into OCTS 1.0.

IF File Name	OCTS 1.0 .DAT Records	OCTS 1.0 .XLS Records	Siebel IF Table Records	Siebel Base Table Records	Comments
S_ACCOUNT_IF	75	75	75	75	*Refer to Note #1 below
S_ACCOUNT_DTLIF	75	75	75	75	*Refer to Note #1 below
S_CONTACT2_IF	4	4	4	4	
S_CONTACT_DTLIF	4	4	4	4	
S_SRV_REQ_IF	7	7	7	7	
S_SR_DTLIF	7	7	7	7	
S_ACTIVITY_IF	7	7	7	7	
S_ACT_DTLIF	7	7	7	7	

Note(s):

1. 21 Customer Accounts and 54 Partner Accounts have been converted into OCTS 1.0.

Data Conversion Task #9

Converting all Closed Cases (excluding Debra Wiley's, Dottie Kingsley's, Joyce DeMoss's, and Yolanda Blackman's Cases) from the VDC Development Database into Microsoft Excel.

IF File Name	OCTS 1.0 .DAT Records	OCTS 1.0 .XLS Records	Siebel IF Table Records	Siebel Base Table Records	Comments
S_ACCOUNT_IF	5,133	5,133	5,133	5,133	
S_ACCOUNT_DTLIF	6,027	6,027	6,027	6,027	
S_CONTACT2_IF	5,169	5,169	5,169	5,169	
S_CONTACT_DTLIF	5,217	5,217	5,217	5,217	
S_SRV_REQ_IF	6,128	6,128	6,128	6,128	
S_SR_DTLIF	6,128	6,128	6,128	6,128	
S_ACTIVITY_IF	18,063	18,063	18,063	18,063	
S_ACT_DTLIF	18,054	18,054	18,054	18,054	

Note(s):

None

Data Conversion Task #10

Converting all OCTS 1.0 Accounts and Contacts into OCTS 2.0 “Go Live” Database. Also, converting all Open Cases as of 10/27, 8:30 p.m. EST from OCTS 1.0 into the OCTS 2.0 “Go Live” Database.

IF File Name	OCTS 1.0 .DAT Records	OCTS 1.0 .XLS Records	Siebel IF Table Records	Siebel Base Table Records	Comments
S_ACCOUNT_IF	7,949	7,949	7,773*	7,773*	*Refer to Note #1 & #2 below
S_ACCOUNT_DTLIF	7,969	7,969	7,773*	7,773*	*Refer to Note #1 & #2 below
S_CONTACT2_IF	8,230	8,230	7,719*	7,719*	*Refer to Note #2 below
S_CONTACT_DTLIF	7,917	7,917	7,719*	7,719*	*Refer to Note #2 below
S_SRV_REQ_IF	412	412	412	412	*Refer to Note #2 below
S_SR_DTLIF	412	412	412	412	*Refer to Note #2 below
S_ACTIVITY_IF	4,743	4,743	4,743	4,743	*Refer to Note #2 below
S_ACT_DTLIF	4,743	4,743	4,743	4,743	*Refer to Note #2 below

Note(s):

1. 7,719 Customer Accounts and 54 Partner Accounts have been converted into OCTS 1.0.
2. 176 ACCOUNT_IF records, 196 ACCOUNT_DTLIF records, 511 CONTACT2_IF records, and 196 S_CONTACT_DTLIF records were not imported into the OCTS 2.0 Siebel application because they contained duplicate SSNs. Since the SSN field is the primary key in Siebel, records with the same SSN could not be imported into Siebel without errors. Consequently, a listing of all of these duplicate records not imported in the Siebel application has been provided to the Ombudsman to make any necessary updates to records in the Siebel application post-Data Conversion. These spreadsheets (S_ACCOUNT_IF_WITH_DUPLICATES, S_ACCOUNT_DTLIF_WITH_DUPLICATES, S_CONTACT2_IF_WITH_DUPLICATES, S_CONTACT_DTLIF_WITH_DUPLICATES) are located on the web on the following address: <http://4.20.3.242/ncs-sw>.

Data Conversion Task #11

Converting all OCTS 1.0 Closed Cases and corresponding Activities as of 11/6 into OCTS 2.0 “Go Live” Database.

IF File Name	OCTS 1.0 .DAT Records	OCTS 1.0 .XLS Records	Siebel IF Table Records	Siebel Base Table Records	Comments
S_ACCOUNT_IF	N/A	N/A	N/A	N/A	
S_ACCOUNT_DTLIF	N/A	N/A	N/A	N/A	
S_CONTACT2_IF	N/A	N/A	N/A	N/A	
S_CONTACT_DTLIF	N/A	N/A	N/A	N/A	
S_SRV_REQ_IF	8,287	8,287	8,287	8,287	
S_SR_DTLIF	8,287	8,287	8,287	8,287	
S_ACTIVITY_IF	26,614	26,614	26,614	26,614	*Refer to Note #1 below
S_ACT_DTLIF	26,614	26,614	26,614	26,614	*Refer to Note #1 below

Note(s):

1. 418 Activities (associated with the 8,287 Cases) had Activity Comments greater than 2,000 characters in length. As a result, separate Microsoft Word documents were created to store these comments and each Microsoft Word document was attached to its respective Case.